

* GUIDANCE FOR PLENARY SESSIONS:

(A) Project Office:

- High Level Technical (Scope)/Cost/Schedule/Funding-Cost Profiles
- Management: Organizational Structure and Management Plan
- Funding Flow by Institution (NSF→Columbia→BNL→Univ or Contractor)
- Assumed Physicist Availability Profiles
- Schedule overview, milestones, etc.
- Contingency Control
- Contracting / Procurement Planning and Organization
- Operations Planning

(B) KOPIO & MECO:

- Begin KOPIO and MECO talks with science to be covered
- Performance Requirements to cover this science
- Technical (Scope) Description for each Experiment
- Describe how this Technical Design (Scope) meets the Performance Requirements
- Cost and Schedule Methodology and Development Guidance
- Risk Analysis and Contingency Analysis / Requirements
- Funding and Cost Profiles
- Organizational Structure
- Management Plan
 - Technical / Cost / Schedule Baselines
 - Tiered Milestones
 - Change Control, Table of Approval Levels (Baseline Level vs Mgmnt Level)
- Operations Planning

(C) MECO Magnet & AGS:

- For MECO Magnet and AGS substitute following for science:
 - Present Performance Specifications
 - Present Design Concept; note how design meets specs
- Cost and Schedule Methodology and Development Guidance
- Risk Analysis and Contingency Analysis / Requirements
- Funding and Cost Profiles
- Organizational Structure
- Management Plan
 - Technical / Cost / Schedule Baselines
 - Tiered Milestones
 - Change Control, Table of Approval Levels (Baseline Level vs. Mgmnt Level)
- Operations Planning

**** GUIDANCE FOR BREAKOUT SESSIONS:**

(A) Breakout Session A for projects begins with 3-4 talks of total duration ~ 60'

- Presentation from Level 2 Managers:
 - More detailed description of technical approaches, cost, & schedule
 - Presentation of information similar to that outlined in bullets directly below for other Level 3 elements
- 2-3 example Level 3 Elements:
 - Present Performance Specifications
 - Present Design Concept; note how design meets specs
 - Detailed Schedule noting tiered milestones, why important
 - Cost Estimate; 3 or 4 detailed examples
 - Major Procurements; plans for placing; schedule, institution

(B) Latter half of Session A, continuing in Sessions B & C: Detailed Examination of Cost and Schedule

- Basis of Estimate with Cost Books
 - Committee drill downs
 - Committee roll ups
- Schedule – Show main elements, durations, linkages, dependencies

(C) Management Breakout Sessions:

- Project Office interactions with NSF, DOE, BNL, and Site Office.
- Discuss relationships between various entities, e.g. DOE/NSF (MOU, JOG), DOE/BNL, NSF/BNL
- Procurement, intellectual property, money flow
- BNL resource assignment, distribution, and flexibility
- Communication with Level 2 managers, projects, experiments, etc.